

Steve and Sally need help with their taxes. They have done most of the work, but they are not sure what to put on lines 11a, 11b, 12a and 12b of their Form 1040A. According to the 1099-R forms that they have brought with them, you observe that they received the following retirement income for the year:

- ABC Pension - \$4,382 (fully taxable)
- XYZ Pension - \$9,202 (taxable portion = \$7,834)
- Sally's IRA withdrawal - \$3,809 (fully taxable)
- Steve's IRA withdrawal - \$4,800 (taxable portion \$4,193)

Income

Attach Form(s) W-2 here. Also attach Form(s) 1099-R if tax was withheld.

If you did not get a W-2, see page 22.

Enclose, but do not attach, any payment.

7 Wages, salaries, tips, etc. Attach Form(s) W-2. 7

8a Taxable interest. Attach Schedule 1 if required. 8a

b Tax-exempt interest. Do not include on line 8a. 8b

9a Ordinary dividends. Attach Schedule 1 if required. 9a

b Qualified dividends (see page 23). 9b

10 Capital gain distributions (see page 23). 10

11a IRA distributions. 11a 11b Taxable amount (see page 23). 11b

12a Pensions and annuities. 12a 12b Taxable amount (see page 24). 12b

13 Unemployment compensation and Alaska Permanent Fund dividends. 13

14a Social security benefits. 14a 14b Taxable amount (see page 26). 14b

15 Add lines 7 through 14b (far right column). This is your **total income**. ► 15